August 24, 2005

*** ADDENDUM *** ADDENDUM *** ADDENDUM ***

SOLICITATION: **JG6011**
DUE DATE: **August 31, 2005**
TIME: **3:00 PM**
DESCRIPTION: **INTERNET BASED FIXED ASSET CAPITAL MANAGEMENT SYSTEM FOR SCHOOL DISTRICTS AND CHARTER SCHOOL FACILITIES**
ADDENDUM #1

The following are to be added or changed to the specifications for this RFP:

1. Please find attached a copy of the questions received with their respective answers.

2. With procurement, process questions contact Jared Gardner (801) 538-3342.

******************************END OF ADDENDUM******************************

To acknowledge receipt of addendum, include a copy of this addendum with RFP submittal or give written acknowledgement with the RFP. It shall be the responsibility of the bidder to appropriately disseminate this information to all concerned prior to the assigned bid time.

_____   _____   _____
 Company Name   Signature   Date

3150 State Office Building - Capitol Hill - Salt Lake City, Utah 84114-1061
Phone: (801) 538-3026 - Fax: (801) 538-3882 - www.purchasing.utah.gov

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Questions for Request for Proposal Solicitation Number JG6011

Capital and Maintenance Management System

Utah State Office of Education

August 23, 2005

1. Has the State consulted with outside resources prior to developing this RFP
    A: Yes, to determine feasibility of the project.

2. Initially how many districts would be required to use this system?
    A: There is no requirement that any school districts or charter schools would be required to use the system; it is a local decision.

3. Would it be the state's intention to have all districts in the state use the same system?
    A: No; it is at the discretion of the local school district or charter school board of education or administration.

    4. Is there any timeline goal for a "go live" date? Is there a timeline for the start of this project? Is there a mandated or targeted completion date for the entire project or for any particular phase?

    A: No. We will begin as soon as the contract is awarded; we expect all offerors to be ready to move ahead as soon as the contract is awarded.

5. Is the system purchase approved for the current Fiscal 2005-2006 budget year?
    A: Yes.

6. What are the milestone dates for:
    a. Completion of proposal review?
        A: No date is set; we anticipate a few weeks at the most.
    b. "Short list" determination? (How many will be on the short list?)
        A: A "short list" may or may not be determined. The number on a potential "short list" will be determined by the evaluation committee.
    c. On-site oral presentations?
        A: On-site oral presentations, at the expense of the offeror, may or may not be required.
    d. Final vendor selection?
        A: No date has been selected.
    e. Implementation start date?
        A: No date has been selected.

7. How will the State handle districts that already own or have built their own Capital and Maintenance Management system? Will they be required to make a switch if the State finds a suitable system?
    A: School Districts and Charter Schools will not be required to switch to the state system.

8. Does the state wish to include Utility Management as a part of the Maintenance Management system?
   A: Please follow the specifications in the Request for Proposal; do not assume anything more for purposes of evaluating the offers.

9. Pricing for our services is based upon student enrollment – research indicates that for the 2005-2006 school year that in Utah attendance will reach approx 505,000 students. Is this a correct figure?
   A: Close: 505,400

10. Who do you envision the majority of maintenance and capital requests coming from within a district and/or charter school?
    A: School districts.

11. Would it be desirable for principals and/or teachers to have access to the system with an approval/routing mechanism to/from the business office, facilities department, etc.?
    A: Yes
    Would unlimited users licensing be desirable?
    A: Yes.

12. Would you like for us to provide references that involved similar projects on a provincial/state wide level with educational organizations?
    A: Please follow the instructions in the RFP.

13. Would it be beneficial to track how community use of buildings affects the budget and life of these capital assets?
    A: Yes

14. Has this project already been funded by the State?
    A: Yes

15. Will districts receive funding by the state to carry through with this project?
    A: Yes, through their regular state Uniform School Fund and local property tax resources.

16. Do we need to register as a vendor with the state prior to submitting our response?
    A: No.

17. Can the RFP response deadline be postponed by one to two weeks to allow us to better allocate internal resources?
    A: No.

18. What is the primary business rationale for implementing these systems?
    A: We expect that the majority of Utah school districts—which are small and rural— will be able to implement a resource that heretofore is only available to larger school districts with the resources to up-front the high costs of getting such a program instituted.

19. What, if any, additional approvals are required to procure this system? How will the selection process work?
    A: The Proposal Evaluation Committee will evaluate each proposal and make its recommendation to the State Superintendent; there may or may not be a

requirement for the final list of offerors to make oral presentations; the State Superintendent will sign off and the contract will be awarded. However, please see the paragraph labeled "PROPRIETARY INFORMATION" in the RFP:

"Proposals may be reviewed and evaluated by any person at the discretion of the State."

20. Can you provide us with the names and titles of who is on the Evaluation Committee?

  A: No.

21. Is there an Executive Sponsor for this initiative?

  A: No.

22. Is there a ballpark approved budget that Utah State Office of Education (USOE) can share with us?

  A: No.

23. Can the state provide information on the number of users expected to access the application that comprise the system? Software License Questions:

- What is the number of users anticipated who will access the Maintenance Management System on a daily basis?
  A: Estimated up to 250
- What is the number of users who will access less frequently w/more limited functionality required?
  A: Estimated up to 2,500

- What are the number of mobile/PDA users (subset or incremental to the above number)?
  A: Estimated up to 1,500

- How many work-requester only users are anticipated?
  A: Estimated up to 5,000

How many concurrent users do you anticipate needing at each school district?

A: Up to 25

What is the total number of core concurrent users (not requestors) that should be included in the Cost Proposal?

A: Up to 5

Our software uses a concurrent user licensing model. Please provide estimated quantities of the maximum number of concurrent users for each of the following functions

a. Location data entry and maintenance—up to 250
b. Asset surveys—up to 250
c. Asset condition assessment inspections and evaluations—up to 250
d. Asset Master Plan entry, updating and overall management—up to 250
e. Submission of Work Requests or inquiring as to the status of work previously submitted—2,500
f. Work Managers – Directors, Managers, etc.—up to 250

g. Work Supervisors—up to 250
h. Help Desk Operators or Dispatch Operators—up to 250
i. Number of in-house Crafts Persons and/or contractors who may need to access the system to get their assigned work, update status, resources, costs, etc.? Up to 1,500. Do you envision using the Internet for this function or PDA's – or a mix of both? -- Mix of both.
j. Preventive maintenance management – setting up and maintaining PM procedures, schedules, and resources.—up to 250
k. Stores management – spare parts inventory for corrective and preventive maintenance—up to 250
l. Reporting of all kinds – both asset management and maintenance management—up to 500
m. For the PDA software – is there a required operating system (e.g., Palm or Microsoft Windows Mobile). If there is no requirement is there a preferred PDA OS?—No.
n. For the PDA software – should this be included as an option or put into the base price?—Please follow the directions in the RFP.
o. Should we include PDA hardware pricing as well as PDA software licensing? –Please follow the directions in the RFP
p. Should some number of PDA's be "ruggedized?" i.e. meet IP54 specs (performance in rough conditions or IP64 specs (performance in harsh conditions). How many for each spec?—you may place as options for both.
q. Is barcode scanning required on the PDA's? If so, do all PDA's need that feature, or just some? How many?—Barcode scanning is not required.

24. Is USOE open to an approach that will utilize a Systems Integrator as the Prime contractor?
A: No.

25. Does USOE desire an externally (ASP) or internally hosted web-based solution?
A: Externally hosted web-based solution.

26. Does USOE have interest in a similar centralized enterprise approach for IT Asset Management or Fleet Management for the remote School Districts and Charter Schools (utilizing the same system/platform)?
A: Please follow the instructions in the RFP.

27. Do you require integration with any other systems (e.g. Finance System, HR system, etc…) as part of this proposal?
A: No.

28. Training: How many users will be included in the "initial training" mentioned in the RFP?
A: Unknown.

29. Data Conversion: What systems will the Capital Planning tool and Maintenance Management System replace?
A: None

30. Will any data conversion from existing systems need to be included in the scope of this project?

A: No.

31. Are there any WBE or SBE requirements for this bid?

A: No.

32. We do not sell hardware – is USOE open to us just providing specs for hardware while you utilize your existing procurement vehicles for hardware?
A: No; Please follow the instructions in the RFP.

33. What internal staff does USOE plan to commit to this project – both in the implementation phase and the ongoing administration/maintenance phase?
A: None.

34. The bid states that site plans, floor plans, and maps must be available. Can you provide more details on how you would like these to be available?
A: In whatever means you think the evaluation committee will be able to best assess your plan.

35. Do these resources currently exist or do they need to be created?
A: They do not exist.

36. What fixed asset capital management and maintenance system(s) is currently in place at USOE large school districts?
A: Various vendors from Utah and from around the nation; one large district has created their own capital management and maintenance plan.

37. Does the state intend on creating its own project team and who would be on that team?
A: No.

38. Will the state provide a building list including square footage for the 40 school districts and 39 charter schools? Could you please tell me the total square footage of the schools to be managed by the proposed system?

A: The state does not collect either a building list or square footage data for the 40 school districts and 39 charter schools and cannot provide this data.

39. Is each vender required to provide the hardware required to support the system or are the vendors required to provide hardware specifications and the state will purchase the hardware independently of this RFP?
A: Each vendor is required to provide the hardware and specifications required to support the system.

40. Has the state standardized on a particular CMMS?
A: No.

41. How do you define a Master Plan Database?
A: It is the database for a project that is contained within a defined master plan for a school district or charter school.

42. Is the Master Plan a tool to track capital projects or ALL work orders?

A: It should have the ability to track capital projects; work orders can be tracked within the master plan tool or elsewhere within the system.

43. Does the Master Plan require a *calendar* overview of all scheduled work?
A: Yes.

44. Can you give an example of a Master Plan?
A: We suggest you provide a master plan example in whatever format you think the evaluation committee will be able to best assess your plan.

45. Can you define self-inspect?
A: The offeror must provide training so that school district and charter school personnel have the ability to assess their facilities themselves.

46. What does "defer the item to a later self-inspection" mean?
A: Deferring an item to a later self-inspection means to defer the identified needed facility correction to a later date when a re-inspection will be done to assess the now-deferred project cost and potential effect on other potential facility corrections.

47. Under **Data Upkeep and Management,** is the expectation that the processes described (i.e. Processes for assets with a short remaining life) is defined for the user during implementation?
A: Yes.

48. Does custom documentation provided upon implementation completion satisfy this requirement?
A: Documentation as well as training for all school district and charter schools.

49. How do you intend the software to define a business process such as "deciding to fund or defer the item ..."?
A: In whatever format you think the evaluation committee will be able to best assess your plan.

50. How much does the state intend to use the Capital Management Tool? It seems this is focused on the districts/charter schools and that only reporting will be used by the state.
A: Yes, only reporting will be used by the state.

51. Is training required on site or off site?
A: USOE prefers on-site training, however, other solutions will be considered.

52. Does the state intend to provide any training to districts/charters on the use of the system selected? It is common for our organization to "train the trainer" which allows a company to internalize and customize their support system.
A: The state does not intend to provide any training to districts/charter schools.

53. Do you anticipate the opportunity for multiple districts/charters requiring training at the same time?
A: That is possible.

54. Could we provide group training sessions so that everyone benefits from economies-of-scale?

A: Yes.

55. Are you requiring the vendor to train all core users, or does USOE prefer a train-the-trainer scenario?

A: The vendor does the training.

56. In the bid you mention weekly training must be provided for Utah School Districts and Charter Schools. Why is there the requirement to provide "weekly" training for the school districts and charter schools?

A: The maintenance management system offeror must provide training at one week intervals—until the training is completed and the district/charter school personnel have mastered the objectives of the training—to ensure all appropriate personnel are trained adequately, within the district/charter school work schedule, and within the current workload demands of the district or school.

57. If the firm is to provide weekly training does USOE prefer that this be accomplished through on-line services (such as Webex or Live Meeting)?

A: USOE is open to the offerors proposal regarding training.

58. What is the State of Utah's standard e-mail system? E.g. Microsoft Exchange/Outlook, Lotus Notes, etc.

A: Microsoft Outlook

59. Must the system operate on a specific database platform (e.g., Oracle, Microsoft SQL Server, Sybase, etc)? If a specific DBMS is not required, is there a preferred DBMS? What version of the DBMS must be supported for the initial implementation?

A: The system may operate on any database platform; there is no preferred database management system. Please see the description of database requirements in the RFP.

60. Can we assume that the State already has the DBMS license with a sufficient number of user licenses for the system, or must they be supplied by with the system?

A: The state does not already have the DBMS license; offeror must supply per the requirements of the RFP.

61. Does the state have a standard for its Internet browser? If so what is it? If not, which browsers must be supported by the system?

A: The state uses Microsoft Internet Explorer.

62. What will be ITS involvement in the project?

A: None.

63. Do you have a work flow diagram of how you envision the flows to be, in addition to where each activity will be performed (i.e., at the School, District, ITS, OE, etc)

A: No.

64. We assume that "Central" means you want the database in house at OE and everything else is thin client – is that correct?

A: No. We want it hosted by the offeror; the State Office of Education needs access to the data to be able to do analyses, however.

The following questions are related to the subject of how much of a "turnkey" proposal are you are looking for – especially the SSL VPN piece as well as other network and server infrastructure elements.

65. Citrix – we know the State of Utah is a Citrix user. Should the proposal include Citrix licenses and/or Microsoft Terminal Services CAL licenses or does the State already have Citrix operational for the DOE and no further Citrix Metaframe or MS TS CALs are required?

    A: No. We do not have Citrix. We have Terminal Server but we would need more licenses for this project.

66. What is the current configuration of the State's Citrix server farm for the OE?

    A: There is none.

67. Has the State standardized on an SSL VPN solution that it prefers in order to maintain compatibility with the existing network infrastructure?

    A: Yes. However this is only an issue if USOE is hosting and USOE is not going to host this application, the offeror will host it.

68. Are you looking for a "full turnkey" proposal? – including hardware, DBMS, Citrix, etc, in addition to the application software?

    A: Yes.

69. Will data conversion services be required for this project?

    A: No.

70. Is it possible to get an electronic copy of the bid, preferably in word format?

    A: The document is only avaliable in a .pdf format please following the link: http://www.purchasing.utah.gov/BidHeaders/10449.pdf

71. Are there any advantages or disadvantages foreseen for software vendors and/or third-party implementers appearing on multiple proposals?

    A: No.

72. With the statement of GPS data, is the Office of Education assessing the use of GIS functionality?

    A: No.